IARL – Initial Assessment and Review List

This screen displays, in reverse chronological order, the history of assessments and reviews that have been done for a specific client.

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CAFSIARL         INITIAL ASSESSMENT AND REVIEW LIST      09/26/2007    14:30
USER ID : CS4566                                                PAGE NO:    1
CAPS ID : 00002081     46     NAME: HARTLEY, JESSICA


TO DISPLAY, ENTER X: X  ACTIVE ONLY    _  ACTIVE AND INACTIVE
START FROM:                      REVIEW TYPE:
TO SELECT, ENTER I=INQUIRE OR M=MODIFY - IF F11(ADD), ENTER TYPE:
         OR D=DELETE                         APRV              RVW
SEL    DATE       TYP    DESCRIPTION          STAT   NEXT REVIEW   STAT
 _   06/01/2007   FCR    FOSTER CARE BY F.C.R        12/01/2007    A
 _   01/01/2007   INA    INITIAL REVIEW/ASSES   A                  A









                                                          PATH: ▮
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Field Descriptions (F12) indicates code lookup is available.

CAPS ID (F12)
Enter the CAPS ID of the client you wish to add or view assessment/review details for.

NAME
This field will display the name of the client whose ID is entered in the CAPS ID field.

TO DISPLAY ENTER X – ACTIVE ONLY or ACTIVE AND INACTIVE
This field will default the "X" to active only. You can mark the "X" in front of active and inactive if you wish to view inactive court review records that were recorded in the system prior to July 1, 2005.

START FROM
You can enter a date in order to view assessment/review details from that date to current date.

REVIEW TYPE (F12)
You can enter up to five specific assessment/review types that you wish to view.

IF F11 (ADD), ENTER TYPE (F12)
Prior to pressing F11 to add a new assessment/review, you must select the assessment/review type you are going to add. This tells the system what fields to auto-populate on the IARD (Initial Assessment and Review Detail) screen. *The first review a client can have is an INA (Initial Assessment).*

SEL
Enter "I" if you want to inquire on assessment/review information, "M" if you want to modify assessment/review information or "D" if you want to delete assessment/review information. *Once an assessment/review detail has been approved by your supervisor it cannot be modified or deleted.*

DATE
This field will display the date the assessment/review was completed.

TYP (F12)
This field will display the code for the assessment/review type that was completed.

DESCRIPTION
This field will display the description for the assessment/review type that was completed.

APRV STAT
This field will display the approval status for the assessment/review. If the field is blank, no approval has been entered. This field will display an "A" if the assessment/review has been approved or a "D" if the assessment/review has been denied.

NEXT REVIEW
This field will display the date the next assessment/review is due. This field will auto-populate on the detail screen when a FCR (Foster Care Review) or PER (Periodic Review) is entered for six months from the current assessment/review date. *The worker will receive an alert 30 days prior to this next review date.*

RVW STAT
This field will display an "A" if the assessment/review is active or an "I" if the assessment/review is inactive.

Additional Information

In order to add a closure review the following must be completed. Once the closure review has been successfully entered, the client will continue to remain open and visible on your caseload list until the closure review has been approved by your supervisor.

1) All services on SERL (Services List) must be closed

2) All placements on CPHL (Client Placement History List) must be closed

3) The initial assessment (INA) must have been approved by your supervisor

4) All payments associated with that client must have been approved
   NOTE: you may receive a message when trying to close that you can't because there are payments, and when you look on PAYA (Payment Approval List) you can't find any payments. Usually, this is because there are invoices associated to that client that providers haven't returned. Notify Central Office and they can assist you with these payments.

5) The trust account on TAHL (Trust Account History List) must be closed. If there is a balance, an expenditure request will have to be made to refund the balance to the appropriate party (client, social security, child support, etc.) Notify Central Office and they can assist you with the trust account.